

Military OneSource Program
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1. **REPORTING REQUIREMENTS.** The following specified documents are requirements of the PWS. Nothing in these documents, however, supersedes applicable laws and regulations unless a specific exemption has been obtained.

1.1. **PROGRAM REPORT**

- 1.1.1. Narrative executive summary of work accomplished during the reporting period to include key data highlights for each of the categories.
- 1.1.2. Problem areas or issues that have been identified during the period and resolution action taken, if any.
- 1.1.3. Attached to this report will be copies of any ad-hoc reports (informal and formal) that have been provided to any DoD organization or MC&FP staff during the period. Individual Military Service Branch and installation reports will be prepared and submitted monthly as attachments to the monthly contracting report.
- 1.1.4. Utilization information for the current month, percent change from the same month of the previous fiscal year, utilization for the current fiscal year to date, and percent change from fiscal year to date of the previous year, in the following categories:

1.1.5. **CALL CENTER UTILIZATION**

- 1.1.5.1. Incoming phone contacts
- 1.1.5.2. Outgoing phone contacts
- 1.1.5.3. Incoming email contacts
- 1.1.5.4. Outgoing email contacts
- 1.1.5.5. Top five reasons to call or go online
- 1.1.5.6. Number of Quick Calls and type
- 1.1.5.7. Information and Referral Calls:
- Top Ten Information and Referral Categories in which Participants request assistance;
 - Location (City, State, Country and Closest Installation);
 - Military Service (Army, Army Reserves, Air Force, Air Force Reserves, Navy, Navy Reserves, Marines, Marine Reserves, National Guard (Air or Army), Civilian Expeditionary, Coast Guard, Coast Guard Activated with Navy);
 - Status of Military Member (Active, Reservist, Activated Reservist, Activated Guard, Activated Civilian Expeditionary, Inactive Reservist, Inactive Guard, Unknown by Family Member);
 - Demographics by Rank, Gender, Age, Affiliation (Service Member, Family Member Spouse, Family Member Dependent Child, Family Member Dependent Parent, Retiree/Veteran, Non-Dependent Parent, Guardian, DoD Service Provider, or other) and Marital Status (Single, Married, Divorced, Separated, Widow, Widower, Dual Military Career, Single Parent with Custody);

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- How did Participant hear about MOS reporting categories (i.e. Website, Friends, Flyer, Family Center, Military Treatment Facility, Chaplain, Command, Supervisor, Event, Promotional Item, or Other).

1.1.5.8 Number of calls requiring translator:

- Language requested;
- Type of Service requested for translation: Quick Call, Information and Referral, Non-Medical Counseling (face to face, telephonic, online, or video – if applicable) (individual, family and couple), Health and Wellness Coaching, Financial Counseling (face to face and telephonic) Tax Services, Document Translation Services, and Specialty Consultations to include Special Needs Consultation, Wounded Warrior, Elder Care, Education, Adult Disability, Adoption, and Work Life or Spouse Career Education and Opportunities (SECO).

1.1.6 CASE REPORTS

1.1.6.1 Number of open and closed cases to include:

- Location (City, State, Country and Closest Installation);
- Military Service (Army, Army Reserves, Air Force, Air Force Reserves, Navy, Navy Reserves, Marines, Marine Reserves, National Guard (Air or Army), Civilian Expeditionary, Coast Guard, Coast Guard Activated with Navy);
- Status of Military Member (Active, Reservist, Activated Reservist, Activated Guard, Activated Civilian Expeditionary Inactive Reservist, Inactive Guard, Unknown by Family Member);
- Demographics by Rank, Gender, Age, Affiliation (Service Member, Family Member Spouse, Family Member Dependent Child, Family Member Dependent Parent, Retiree/Veteran, Non-Dependent Parent, Guardian, DoD Service Provider, or other) and Marital Status (Single, Married, Divorced, Separated, Widow, Widower, Dual Military Career, Single Parent with Custody);
- Type of Service requested: Non-Medical Counseling (face to face, telephonic, online, or video – if applicable) (individual, family, and couple), Health and Wellness Coaching, Financial Counseling (face to face and telephonic), Tax Services, Document Translation Services, Specialty Consultations (to include Special Needs Consultation, Wounded Warrior, Elder Care, Education, Adult Disability, Adoption, and Work Life), and Spouse Education and Career Opportunities (SECO).

1.1.6.2 Number of Participants utilizing repeat services to include:

- Type of Service requested: Non-Medical Counseling (face to face, telephonic, online, or video – if applicable) (individual, family and couple), Health and Wellness Coaching, Financial Counseling (face to face and telephonic) Tax Services, Document Translation Services, Specialty Consultations (to include

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Special Needs Consultation, Wounded Warrior, Elder Care, Education, Adult Disability, Adoption, and Work Life), and Spouse Education and Career Opportunities (SECO);

- Location (City, State, Country and Closest Installation);
- Military Service (Army, Army Reserves, Air Force, Air Force Reserves, Navy, Navy Reserves, Marines, Marine Reserves, National Guard (Air or Army), Civilian Expeditionary, Coast Guard, Coast Guard Activated with Navy);
- Status of Military Member (Active, Reservist, Activated Reservist, Activated Guard, Activated Civilian Expeditionary Inactive Reservist, Inactive Guard, Unknown by Family Member);
- Demographics by Rank, Gender, Age, Affiliation (Service Member, Family Member Spouse, Family Member Dependent Child, Family Member Dependent Parent, Retiree/Veteran, Non-Dependent Parent, Guardian, DoD Service Provider, or other) and Marital Status (Single, Married, Divorced, Separated, Widow, Widower, Dual Military Career, Single Parent with Custody);

1.1.6.3 Report by Location by Closest Installation and City and State to include:

- Type of Service requested: Non-Medical Counseling (face to face, telephonic, online, or video – if applicable) (individual, family and couple), Health and Wellness Coaching, Financial Counseling (face to face and telephonic), Tax Services, Document Translation Services, Specialty Consultations (to include Special Needs Consultation, Wounded Warrior, Elder care, Education, Adult Disability, Adoption, and Work Life), and Spouse Education and Career Opportunities (SECO);
- Number of open and closed cases in that location;
- Military Service (Army, Army Reserves, Air Force, Air Force Reserves, Navy, Navy Reserves, Marines, Marine Reserves, National Guard (Air or Army), Civilian Expeditionary, Coast Guard, Coast Guard Activated with Navy);
- Status of Military Member (Active, Reservist, Activated Reservist, Activated Guard, Activated Civilian Expeditionary Inactive Reservist, Inactive Guard, Unknown by Family Member);
- Demographics Rank, Gender, Age, Affiliation (Service Member, Family Member Spouse, Family Member Dependent Child, Family Member Dependent Parent, Retiree/Veteran, Non-Dependent Parent, Guardian, DoD Service Provider, or other) and Marital Status (Single, Married, Divorced, Separated, Widow, Widower, Dual Military Career, Single Parent with Custody).

1.1.6.4 Number of Adverse incidents and summary regarding incident (reference Sections J-31 & 4).

1.1.6.5 Number of Crisis Calls/Duty to Warn/Mandated Report calls that require tracing, law enforcement, emergency medical, or third party intervention for safety to include:

- Location by Closest Installation and City and State;

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- Military Service (Army, Army Reserves, Air Force, Air Force Reserves, Navy, Navy Reserves, Marines, Marine Reserves, National Guard (Air or Army), Civilian Expeditionary, Coast Guard, Coast Guard Activated with Navy);
- Status of Military Member (Active, Reservist, Activated Reservist, Activated Guard, Activated Civilian Expeditionary Inactive Reservist, Inactive Guard, Unknown by Family Member);
- Demographics Rank, Gender, Age, Affiliation (Service Member, Family Member Spouse, Family Member Dependent Child, Family Member Dependent Parent, Retiree/Veteran, Non-Dependent Parent, Guardian, DoD Service Provider, or other) and Marital Status (Single, Married, Divorced, Separated, Widow, Widower, Dual Military Career, Single Parent with Custody).

1.1.6.6 Number of Calls Referred to Spouse Education and Career Opportunities Program (SECO) to include:

- Location by Closest Installation and City and State;
- Military Service (Army, Army Reserves, Air Force, Air Force Reserves, Navy, Navy Reserves, Marines, Marine Reserves, National Guard (Air or Army), Civilian Expeditionary, Coast Guard, Coast Guard Activated with Navy);
- Status of Military Member (Active, Reservist, Activated Reservist, Activated Guard, Activated Civilian Expeditionary)
- Demographics Rank, Gender, Age, Affiliation (Service Member, Family Member Spouse, Family Member Dependent Child, Family Member Dependent Parent, Retiree/Veteran, Non-Dependent Parent, Guardian, DoD Service Provider, or other) and Marital Status (Single, Married, Divorced, Separated, Widow, Widower, Dual Military Career, Single Parent with Custody).

1.1.7 SPECIALTY CONSULTATIONS

1.1.7.1 WOUNDED WARRIOR

- Number of Cases;
- Number of New Cases;
- Number of Cases Resolved/Closed;
- Number of Cases outside of 96 hour compliance;
- Number of Incoming calls to include: transfers from MOS consultants;
- Number of Calls directly to WW Hotline #;
- Number of Calls to WW Call Back Line transferred from MOS consultant;
- Number of Outbound calls;
- Categories of Caller Concerns;
- Top 3 caller concerns;
- Wounded Warrior Survey ratings;
- Location by Closest Installation and City and State;
- Military Service (Army, Army Reserves, Air Force, Air Force Reserves, Navy, Navy Reserves, Marines, Marine Reserves, National Guard (Air or

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Army), Civilian Expeditionary, Coast Guard, Coast Guard Activated with Navy);

- Status of Military Member (Active, Reservist, Activated Reservist, Activated Guard, Activated Civilian Expeditionary);
- Demographics Rank, Gender, Age, Affiliation (Service Member, Family Member Spouse, Family Member Dependent Child, Family Member Dependent Parent, Retiree/Veteran, Non-Dependent Parent, Guardian, DoD Service Provider, or other) and Marital Status (Single, Married, Divorced, Separated, Widow, Widower, Dual Military Career, Single Parent with Custody).

1.1.7.2 SPECIALTY CONSULTS (ELDER CARE, ADOPTION, ADULT DISABILITY, SPECIAL NEEDS, EDUCATION, WORK LIFE)

- Number of Specialty Consults and Category (Elder Care, Adoption, Adult Disability, Special Needs, Education, and Work Life);
- For each Specialty Consultation Case Type what category of assistance was required;
- For each Specialty Consultation Case Type where were Participants referred to;
- Location by Closest Installation and City and State;
- Military Service (Army, Army Reserves, Air Force, Air Force Reserves, Navy, Navy Reserves, Marines, Marine Reserves, National Guard (Air or Army), Civilian Expeditionary, Coast Guard Activated with Navy);
- Status of Military Member (Active, Reservist, Activated Reservist, Activated Guard, Activated Civilian Expeditionary Inactive Reservist, Inactive Guard, Unknown by Family Member);
- Demographics Rank, Gender, Age, Affiliation (Service Member, Family Member Spouse, Family Member Dependent Child, Family Member Dependent Parent, Retiree/Veteran, Non-Dependent Parent, Guardian, DoD Service Provider, or other) and Marital Status (Single, Married, Divorced, Separated, Widow, Widower, Dual Military Career, Single Parent with Custody).

1.1.7.3 BULK FULFILLMENT

- Number of Bulk Fulfillment Requests;
- Number of Items requested and type of Item (in CSV file format);
- Preferred delivery method used, with justification;
- Requesters Military Affiliation (Navy, Marines, Air Force, Army, National Guard Army, National Guard Air, Coast Guard Activated with the Navy, Civilian Expeditionary);
- Requestors Location by Closest Installation and City and State;
- Who are the materials for (Service Members, Family Members, Service Providers or all), if Service Members and Family Members - identify Military Affiliation (Navy, Marines, Air Force, Army, National Guard Army, National

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Guard Air, Coast Guard Activated with the Navy, Civilian Expeditionary Activated) (Active, Reservist, Activated Reservist, Activated Guard, Activated Civilian Expeditionary Inactive Reservist, Inactive Guard), if Service Provider-identify Organization (Family Service Center, Family Readiness Representative/Officer, Command Representative, Ombudsman, and Office of Survivor Assistance);

1.1.7.4 DOCUMENT TRANSLATION SERVICES

- Number of Documents translated per month;
- Languages that have been translated from English to Foreign Language;
- Languages that have been translated from Foreign Language to English;
- Top 5 types of documents translated (e.g. birth certificates, divorce decrees, leases, diploma, school transcripts, etc.);
- Top 5 Languages translated from English to Foreign language and Foreign Language to English;
- Location by Closest Installation and City and State;
- Military Service (Army, Army Reserves, Air Force, Air Force Reserves, Navy, Navy Reserves, Marines, Marine Reserves, National Guard (Air or Army), Civilian Expeditionary, Coast Guard Activated with Navy);
- Status of Military Member (Active, Reservist, Activated Reservist, Activated Guard, Activated Civilian Expeditionary Inactive Reservist, Inactive Guard, Unknown by Family Member);
- Demographics Rank, Gender, Age, Affiliation (Service Member, Family Member Spouse, Family Member Dependent Child, Family Member Dependent Parent, Retiree/Veteran, Non-Dependent Parent, Guardian, DoD Service Provider, or other) and Marital Status (Single, Married, Divorced, Separated, Widow, Widower, Dual Military Career, Single Parent with Custody);
- Location by state or territory (CONUS) or by country (OCONUS) for utilization of document translation services;
- Number of Participants repeating utilization of document translation services after having a closed case in a reporting year.

1.1.8 SCREENING FOR NON-MEDICAL COUNSELING

1.1.8.1 SCREENING FOR SCOPE

- Number of callers screened for scope;
- By Participant's Presenting Problem;
- Top 5 Participant Presenting Problems at initial scope screen;
- Number of callers out of scope;
- Number of callers out of scope that declined referral, terminated call, accepted referral;
- Category that resulted in Participant being out of scope;

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- Top 5 Categories that place Participant out of scope;
- Out of Scope Participants by Location by Closest Installation and City and State;
- Out of Scope Participants Military Service (Army, Army Reserves, Air Force, Air Force Reserves, Navy, Navy Reserves, Marines, Marine Reserves, National Guard (Air or Army), Civilian Expeditionary, Coast Guard Activated with Navy);
- Out of Scope Participants Status of Military Member (Active, Reservist, Activated Reservist, Inactive);
- Out of Scope Participants Demographics Rank, Gender, Age, Affiliation (Service Member, Family Member Spouse, Family Member Dependent Child, Family Member Dependent Parent, Retiree/Veteran, Non-Dependent Parent, Guardian, DoD Service Provider, or other) and Marital Status (Single, Married, Divorced, Separated, Widow, Widower, Dual Military Career, Single Parent with Custody);
- Number of callers in scope.

1.1.8.2 REFERRAL TO MILITARY FAMILY LIFE COUNSELING PROGRAM (MFLC)

- Number of callers referred to Military Family Life Counseling Program and the MFLC Installations Participant's referred to;
- Number of callers screened out for Military Family Life Counseling due to duty status (e.g. Reservist, Inactive Reservist or Inactive Guard);
- Number of callers screened out for Military Family Life Counseling Program due to proximity to installation;
- Number of callers screened out for Military Family Life Counseling Program due to refusal of referral;
- Participant Location by Closest Installation and City and State;
- Military Service (Army, Army Reserves, Air Force, Air Force Reserves, Navy, Navy Reserves, Marines, Marine Reserves, National Guard (Air or Army), Civilian Expeditionary, Coast Guard Activated with Navy);
- Status of Military Member (Active, Reservist, Activated Reservist, Activated Guard, Activated Civilian Expeditionary Inactive Reservist, Inactive Guard, Unknown by Family Member);
- Demographics Rank, Gender, Age, Affiliation (Service Member, Family Member Spouse, Family Member Dependent Child, Family Member Dependent Parent, Retiree/Veteran, Non-Dependent Parent, Guardian, DoD Service Provider, or other) and Marital Status (Single, Married, Divorced, Separated, Widow, Widower, Dual Military Career, Single Parent with Custody).

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1.1.9 REFERRALS

1.1.9.1 Total referrals to and from Military Treatment Facilities (MTF)

- Military Service (Army, Army Reserves, Air Force, Air Force Reserves, Navy, Navy Reserves, Marines, Marine Reserves, National Guard (Air or Army), Civilian Expeditionary, Coast Guard, Coast Guard Activated with Navy);
- Status of Military Member (Active, Reservist, Activated Reservist, Activated Guard, Activated Civilian Expeditionary Inactive Reservist, Inactive Guard, Unknown by Family Member);
- Demographics Rank, Gender, Age, Affiliation (Service Member, Family Member Spouse, Family Member Dependent Child, Family Member Dependent Parent, Retiree/Veteran, Non-Dependent Parent, Guardian, DoD Service Provider, or other) and Marital Status (Single, Married, Divorced, Separated, Widow, Widower, Dual Military Career, Single Parent with Custody);
- Participant Location by Closest Installation and City and State.

1.1.9.2 Total referrals to and from TRICARE

- Military Service (Army, Army Reserves, Air Force, Air Force Reserves, Navy, Navy Reserves, Marines, Marine Reserves, National Guard (Air or Army), Civilian Expeditionary, Coast Guard, Coast Guard Activated with Navy);
- Status of Military Member (Active, Reservist, Activated Reservist, Activated Guard, Activated Civilian Expeditionary Inactive Reservist, Inactive Guard, Unknown by Family Member);
- Demographics Rank, Gender, Age, Affiliation (Service Member, Family Member Spouse, Family Member Dependent Child, Family Member Dependent Parent, Retiree/Veteran, Non-Dependent Parent, Guardian, DoD Service Provider, or other) and Marital Status (Single, Married, Divorced, Separated, Widow, Widower, Dual Military Career, Single Parent with Custody);
- Participant Location by Closest Installation and City and State.

1.1.9.3 Total referrals to and from Community Mental Health Resources

- Military Service (Army, Army Reserves, Air Force, Air Force Reserves, Navy, Navy Reserves, Marines, Marine Reserves, National Guard (Air or Army), Civilian Expeditionary, Coast Guard, Coast Guard Activated with Navy);
- Status of Military Member (Active, Reservist, Activated Reservist, Activated Guard, Activated Civilian Expeditionary Inactive Reservist, Inactive Guard, Unknown by Family Member);
- Demographics Rank, Gender, Age, Affiliation (Service Member, Family Member Spouse, Family Member Dependent Child, Family Member Dependent Parent, Retiree/Veteran, Non-Dependent Parent, Guardian, DoD Service Provider, or other) and Marital Status (Single, Married, Divorced, Separated, Widow, Widower, Dual Military Career, Single Parent with Custody);
- Location by Closest Installation and City and State.

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- 1.1.9.4 Total referrals to and from Family Army, Navy, Marine or Air Force Support Programs.
- Military Service (Army, Army Reserves, Air Force, Air Force Reserves, Navy, Navy Reserves, Marines, Marine Reserves, National Guard (Air or Army), Civilian Expeditionary, Coast Guard, Coast Guard Activated with Navy);
 - Status of Military Member (Active, Reservist, Activated Reservist, Activated Guard, Activated Civilian Expeditionary Inactive Reservist, Inactive Guard, Unknown by Family Member);
 - Demographics Rank, Gender, Age, Affiliation (Service Member, Family Member Spouse, Family Member Dependent Child, Family Member Dependent Parent, Retiree/Veteran, Non-Dependent Parent, Guardian, DoD Service Provider, or other) and Marital Status (Single, Married, Divorced, Separated, Widow, Widower, Dual Military Career, Single Parent with Custody);
 - Participant Location by Closest Installation and City and State.
- 1.1.9.5 Total referrals to and from Family Advocacy Program
- Military Service (Army, Army Reserves, Air Force, Air Force Reserves, Navy, Navy Reserves, Marines, Marine Reserves, National Guard (Air or Army), Civilian Expeditionary, Coast Guard, Coast Guard Activated with Navy);
 - Status of Military Member (Active, Reservist, Activated Reservist, Activated Guard, Activated Civilian Expeditionary Inactive Reservist, Inactive Guard, Unknown by Family Member);
 - Demographics Rank, Gender, Age, Affiliation (Service Member, Family Member Spouse, Family Member Dependent Child, Family Member Dependent Parent, Retiree/Veteran, Non-Dependent Parent, Guardian, DoD Service Provider, or other) and Marital Status (Single, Married, Divorced, Separated, Widow, Widower, Dual Military Career, Single Parent with Custody);
 - Participant Location by Closest Installation and City and State.
- 1.1.9.6 Total referrals to and from Genderual Assault Response Coordinator
- Military Service (Army, Army Reserves, Air Force, Air Force Reserves, Navy, Navy Reserves, Marines, Marine Reserves, National Guard (Air or Army), Civilian Expeditionary, Coast Guard, Coast Guard Activated with Navy);
 - Status of Military Member (Active, Reservist, Activated Reservist, Activated Guard, Activated Civilian Expeditionary Inactive Reservist, Inactive Guard, Unknown by Family Member);
 - Demographics Rank, Gender, Age, Affiliation (Service Member, Family Member Spouse, Family Member Dependent Child, Family Member Dependent Parent, Retiree/Veteran, Non-Dependent Parent, Guardian, DoD Service Provider, or other) and Marital Status (Single, Married, Divorced, Separated, Widow, Widower, Dual Military Career, Single Parent with Custody);
 - Participant Location by Closest Installation and City and State.

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1.1.9.7 Total referrals to and from Victim Advocacy

- Military Service (Army, Army Reserves, Air Force, Air Force Reserves, Navy, Navy Reserves, Marines, Marine Reserves, National Guard (Air or Army), Civilian Expeditionary, Coast Guard, Coast Guard Activated with Navy);
- Status of Military Member (Active, Reservist, Activated Reservist, Activated Guard, Activated Civilian Expeditionary Inactive Reservist, Inactive Guard, Unknown by Family Member);
- Demographics Rank, Gender, Age, Affiliation (Service Member, Family Member Spouse, Family Member Dependent Child, Family Member Dependent Parent, Retiree/Veteran, Non-Dependent Parent, Guardian, DoD Service Provider, or other) and Marital Status (Single, Married, Divorced, Separated, Widow, Widower, Dual Military Career, Single Parent with Custody);
- Participant Location by Closest Installation and City and State.

1.1.9.8 Total referrals from Other sources (e.g. Command, Chaplain, Wounded Warrior, other service or resource specified.)

- Military Service (Army, Army Reserves, Air Force, Air Force Reserves, Navy, Navy Reserves, Marines, Marine Reserves, National Guard (Air or Army), Civilian Expeditionary, Coast Guard, Coast Guard Activated with Navy);
- Status of Military Member (Active, Reservist, Activated Reservist, Activated Guard, Activated Civilian Expeditionary Inactive Reservist, Inactive Guard, Unknown by Family Member);
- Demographics Rank, Gender, Age, Affiliation (Service Member, Family Member Spouse, Family Member Dependent Child, Family Member Dependent Parent, Retiree/Veteran, Non-Dependent Parent, Guardian, DoD Service Provider, or other) and Marital Status (Single, Married, Divorced, Separated, Widow, Widower, Dual Military Career, Single Parent with Custody);
- Participant Location by Closest Installation and City and State.

1.1.10 CRISIS, DUTY TO WARN, MANADATED REPORTING

- Number of total cases (Crisis/Duty to Warn/Mandated Report)
- Report to be categorized by Military Service: (Army, Army Reserves, Air Force, Air Force Reserves, Navy, Navy Reserves, Marines, Marine Reserves, National Guard (Air or Army), Civilian Expeditionary, Coast Guard, Coast Guard Activated with Navy);
- Location by Closest Installation and City and State;
- Brief narrative of situation requiring Crisis/Duty to Warn/Mandated Report to include disposition of case. (e.g. Participant is safe with EMS, Hospital, Police, Family Advocacy, etc.)
- Status of Military Member (Active, Reservist, Activated Reservist, Activated Guard, Activated Civilian Expeditionary Inactive Reservist, Inactive Guard, Unknown by Family Member);

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- Demographics Rank, Gender, Age, Affiliation (Service Member, Family Member Spouse, Family Member Dependent Child, Family Member Dependent Parent, Retiree/Veteran, Non-Dependent Parent, Guardian, DoD Service Provider, or other) and Marital Status (Single, Married, Divorced, Separated, Widow, Widower, Dual Military Career, Single Parent with Custody).

1.1.11 NON-MEDICAL COUNSELING

1.1.11.1 OVERALL NON-MEDICAL COUNSELING UTILIZATION

- Total Number of referrals to Military OneSource Non-Medical Counseling and type (Individual, Couple, or Family) and Modality (Face to Face, Telephonic, Online, or Video):
 - Military Service (Army, Army Reserves, Air Force, Air Force Reserves, Navy, Navy Reserves, Marines, Marine Reserves, National Guard (Air or Army), Civilian Expeditionary, Coast Guard, Coast Guard Activated with Navy);
 - Status of Military Member (Active, Reservist, Activated Reservist, Inactive)
 - Demographics Rank, Gender, Age, Affiliation (Service Member, Family Member Spouse, Family Member Dependent Child, Family Member Dependent Parent, Retiree/Veteran, Non-Dependent Parent, Guardian, DoD Service Provider, or other) and Marital Status (Single, Married, Divorced, Separated, Widow, Widower, Dual Military Career, Single Parent with Custody);
 - Participant Location by Closest Installation and City and State.
- Total Number of Newly Opened Cases and type (Individual, Couple or Family) and Modality (Face to Face, Telephonic, Online, or Video) :
 - Military Service (Army, Army Reserves, Air Force, Air Force Reserves, Navy, Navy Reserves, Marines, Marine Reserves, National Guard (Air or Army), Civilian Expeditionary, Coast Guard, Coast Guard Activated with Navy);
 - Status of Military Member (Active, Reservist, Activated Reservist, Activated Guard, Activated Civilian Expeditionary Inactive Reservist, Inactive Guard, Unknown by Family Member);
 - Demographics Rank, Gender, Age, Affiliation (Service Member, Family Member Spouse, Family Member Dependent Child, Family Member Dependent Parent, Retiree/Veteran, Non-Dependent Parent, Guardian, DoD Service Provider, or other) and Marital Status (Single, Married, Divorced, Separated, Widow, Widower, Dual Military Career, Single Parent with Custody);
 - Participant Location by Closest Installation and City and State.

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- Top 5 primary Participant issues, identified by applicable v-code categories, for Non-Medical Counseling.

- Total Number of Cases Open in Progress and type (Individual, Couple, or Family and Modality (Face to Face, Telephonic, Online, or Video):
 - Military Service (Army, Army Reserves, Air Force, Air Force Reserves, Navy, Navy Reserves, Marines, Marine Reserves, National Guard (Air or Army), Civilian Expeditionary, Coast Guard, Coast Guard Activated with Navy);
 - Status of Military Member (Active, Reservist, Activated Reservist, Activated Guard, Activated Civilian Expeditionary Inactive Reservist, Inactive Guard, Unknown by Family Member);
 - Demographics Rank, Gender, Age, Affiliation (Service Member, Family Member Spouse, Family Member Dependent Child, Family Member Dependent Parent, Retiree/Veteran, Non-Dependent Parent, Guardian, DoD Service Provider, or other) and Marital Status (Single, Married, Divorced, Separated, Widow, Widower, Dual Military Career, Single Parent with Custody);
 - Participant Location by Closest Installation and City and State.

- Total Number of Cases Closed and type (Individual, Couple, or Family) and Modality (Face to Face, Telephonic, Online, or Video):
 - Military Service (Army, Army Reserves, Air Force, Air Force Reserves, Navy, Navy Reserves, Marines, Marine Reserves, National Guard (Air or Army), Civilian Expeditionary, Coast Guard, Coast Guard Activated with Navy);
 - Status of Military Member (Active, Reservist, Activated Reservist, Activated Guard, Activated Civilian Expeditionary Inactive Reservist, Inactive Guard, Unknown by Family Member);
 - Demographics Rank, Gender, Age, Affiliation (Service Member, Family Member Spouse, Family Member Dependent Child, Family Member Dependent Parent, Retiree/Veteran, Non-Dependent Parent, Guardian, DoD Service Provider, or other) and Marital Status (Single, Married, Divorced, Separated, Widow, Widower, Dual Military Career, Single Parent with Custody);
 - Participant Location by Closest Installation and City and State.

- Total Number of Participant No Shows and Modality (Face to Face, Telephonic, Online, or Video)
- Total Number of Participants referred for Non-Medical Counseling that have not utilized referral; and Modality (Face to Face, Telephonic, Online, or Video)
- Disposition of Case at Closure and type (Individual, Couple or Family) and Modality (Face to Face, Telephonic, Online, or Video) (e.g. Participant Met Goals, Partially Met Goals, Goals not Met, Discontinued Counseling):

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- Military Service (Army, Army Reserves, Air Force, Air Force Reserves, Navy, Navy Reserves, Marines, Marine Reserves, National Guard (Air or Army), Civilian Expeditionary, Coast Guard, Coast Guard Activated with Navy);
 - Status of Military Member (Active, Reservist, Activated Reservist, Activated Guard, Activated Civilian Expeditionary Inactive Reservist, Inactive Guard, Unknown by Family Member);
 - Demographics Rank, Gender, Age, Affiliation (Service Member, Family Member Spouse, Family Member Dependent Child, Family Member Dependent Parent, Retiree/Veteran, Non-Dependent Parent, Guardian, DoD Service Provider, or other) and Marital Status (Single, Married, Divorced, Separated, Widow, Widower, Dual Military Career, Single Parent with Custody); (Single, Married, Divorced, Separated, Widow, Widower, Dual Military Career, Single Parent with Custody);
 - Participant Location by Closest Installation and City and State.
- Total Number of Participants receiving Non-Medical Counseling that required referral for a higher level of care:
 - Military Service (Army, Army Reserves, Air Force, Air Force Reserves, Navy, Navy Reserves, Marines, Marine Reserves, National Guard (Air or Army), Civilian Expeditionary, Coast Guard, Coast Guard Activated with Navy);
 - Status of Military Member (Active, Reservist, Activated Reservist, Activated Guard, Activated Civilian Expeditionary Inactive Reservist, Inactive Guard, Unknown by Family Member);
 - Demographics Rank, Gender, Age, Affiliation (Service Member, Family Member Spouse, Family Member Dependent Child, Family Member Dependent Parent, Retiree/Veteran, Non-Dependent Parent, Guardian, DoD Service Provider, or other) and Marital Status (Single, Married, Divorced, Separated, Widow, Widower, Dual Military Career, Single Parent with Custody);
 - Participant Location by Closest Installation and City and State.
- Participants requiring a higher level of care where did network provider refer Participant to (e.g. Military Treatment Facility, Hospital, Substance Abuse Program, etc.)
 - Number of Participants repeating utilization of non-medical counseling after having a closed case:
 - Military Service (Army, Army Reserves, Air Force, Air Force Reserves, Navy, Navy Reserves, Marines, Marine Reserves, National Guard (Air or Army), Civilian Expeditionary, Coast Guard, Coast Guard Activated with Navy);

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- Status of Military Member (Active, Reservist, Activated Reservist, Activated Guard, Activated Civilian Expeditionary Inactive Reservist, Inactive Guard, Unknown by Family Member);
 - Demographics Rank, Gender, Age, Affiliation (Service Member, Family Member Spouse, Family Member Dependent Child, Family Member Dependent Parent, Retiree/Veteran, Non-Dependent Parent, Guardian, DoD Service Provider, or other) and Marital Status (Single, Married, Divorced, Separated, Widow, Widower, Dual Military Career, Single Parent with Custody);
 - Participant Location by Closest Installation and City and State.
- Average number of Non-Medical counseling sessions utilized per participant per Modality (i.e. in-person, telephonic, web based, video.) per month.
 - Location of participant requesting non-medical counseling and which modality requested (Face to face, web-based, or video)

1.1.11.2 FACE TO FACE COUNSELING IN MOS NETWORK

- Number of referrals to face to face Non-Medical Counseling.
- Number of face to face Non-Medical Counseling sessions were conducted:
 - Military Service (Army, Army Reserves, Air Force, Air Force Reserves, Navy, Navy Reserves, Marines, Marine Reserves, National Guard (Air or Army), Civilian Expeditionary, Coast Guard, Coast Guard Activated with Navy);
 - Status of Military Member (Active, Reservist, Activated Reservist, Activated Guard, Activated Civilian Expeditionary Inactive Reservist, Inactive Guard, Unknown by Family Member);
 - Demographics Rank, Gender, Age, Affiliation (Service Member, Family Member Spouse, Family Member Dependent Child, Family Member Dependent Parent, Retiree/Veteran, Non-Dependent Parent, Guardian, DoD Service Provider, or other) and Marital Status (Single, Married, Divorced, Separated, Widow, Widower, Dual Military Career, Single Parent with Custody);
 - Participant Location by Closest Installation and City and State.
- Average distance of network of Non-Medical Network Counselor from Participant.

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1.1.12 HEALTH AND WELLNESS COACHING

- Number of referrals for health and wellness coaching and focus areas: (Weight Management, Fitness & Exercise, Healthy Eating Habits, General Health & Wellness and Military Physical Fitness Test.) and Modality (Telephonic or Online).
 - Number of Online coaching sessions conducted.
 - Number of Telephonic coaching sessions conducted.
 - Military Service (Army, Army Reserves, Air Force, Air Force Reserves, Navy, Navy Reserves, Marines, Marine Reserves, National Guard (Air or Army), Civilian Expeditionary, Coast Guard, Coast Guard Activated with Navy);
- Status of Military Member (Active, Reservist, Activated Reservist, Activated Guard, Activated Civilian Expeditionary Inactive Reservist, Inactive Guard, Unknown by Family Member);
 - Demographics Rank, Gender, Age, Affiliation (Service Member, Family Member Spouse, Family Member Dependent Child, Family Member Dependent Parent, Retiree/Veteran, Non-Dependent Parent, Guardian, DoD Service Provider, or other) and Marital Status (Single, Married, Divorced, Separated, Widow, Widower, Dual Military Career, Single Parent with Custody);
 - Participant Location by Closest Installation and City and State.
- Average number of Health and Wellness sessions utilized for cases closed during reported month. (Telephonic and Online)
- Number of No Shows per month.
- Top 5 reasons for requesting Health & Wellness Coaching
- Number of Participants at Case Closure (Met Goals, Partially Met Goals, and Goals not Met, Discontinued Coaching).

1.1.13 FINANCIAL COUNSELING

- Number of Referrals for Financial Counseling and modality (Face to Face or Telephonic).
- Number of Face to Face Financial Counseling sessions conducted.
- Number of Telephonic Financial Counseling sessions conducted.
 - Military Service (Army, Army Reserves, Air Force, Air Force Reserves, Navy, Navy Reserves, Marines, Marine Reserves, National

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- Guard (Air or Army), Civilian Expeditionary, Coast Guard, Coast Guard Activated with Navy);
 - Status of Military Member (Active, Reservist, Activated Reservist, Activated Guard, Activated Civilian Expeditionary Inactive Reservist, Inactive Guard, Unknown by Family Member);
 - Demographics Rank, Gender, Age, Affiliation (Service Member, Family Member Spouse, Family Member Dependent Child, Family Member Dependent Parent, Retiree/Veteran, Non-Dependent Parent, Guardian, DoD Service Provider, or other) and Marital Status (Single, Married, Divorced, Separated, Widow, Widower, Dual Military Career, Single Parent with Custody);
 - Participant Location by Closest Installation and City and State.
-
- Average distance of Face to Face Network Financial Counselor from participant's residence.
 - Average number of Financial Counseling sessions utilized for cases closed during a reported month. (Face to Face and Telephonic)
 - Number of No Shows per month.
 - Top Five reasons for requesting Financial Counseling.
 - Number of Participants at Case Closure (Met Goals, Partially Met Goals, and Goals not Met, Discontinued Financial Counseling).

1.1.14 OUTREACH, JFSAP, ON-DEMAND

- Community capacity by type.
- Events supported by type.
- Attendees at supported events by branch and component.
- Events receiving JFSAP support.
- Events receiving other staff/contractor support.
- Events supported by materials only.
- Number of briefings.
- Number of briefing attendees.
- Total number of events.
- Attendees at Yellow Ribbon events.
- Attendees at Pre, During Post deployment events.
- Total number of Yellow Ribbon events.
- Total number of Pre, During Post events.
- Attendees at Family, Unit, Military Leadership, Training and other events.
- Number of outreach encounters.
- Number of outreach attendees.
- Number of Partnership meetings & attendees.
- Number of Collaborative meetings & attendees.

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- Total Community Capacity Encounters & Attendees.
- Information & Referral Encounters & Attendees.
- Service member & family members.
- Professional Support encounters & attendees.
- Military leaders & military service providers.
- Civilian service providers.
- Total direct support activities & attendees.

1.1.15 EDUCATIONAL MATERIALS

- Number Ordered through call center.
- Number Ordered online.
- Top 5 Products and or Items requested
- Material listing with Item description, type of material, available quantity, and 12 month rotating distribution totals.
 - Military Service (Army, Army Reserves, Air Force, Air Force Reserves, Navy, Navy Reserves, Marines, Marine Reserves, National Guard (Air or Army), Civilian Expeditionary, Coast Guard, Coast Guard Activated with Navy);
 - Status of Military Member (Active, Reservist, Activated Reservist, Activated Guard, Activated Civilian Expeditionary Inactive Reservist, Inactive Guard, Unknown by Family Member);
 - Demographics Rank, Gender, Age, Affiliation (Service Member, Family Member Spouse, Family Member Dependent Child, Family Member Dependent Parent, Retiree/Veteran, Non-Dependent Parent, Guardian, DoD Service Provider, or other) and Marital Status (Single, Married, Divorced, Separated, Widow, Widower, Dual Military Career, Single Parent with Custody);
 - Participant Location by Closest Installation and City and State.

1.1.16 TAX SERVICES

- Number of calls.
- Number of Federal returns filed.
- Number of State returns filed.
- Total number of returns filed FYTD.
- Military Service (Army, Army Reserves, Air Force, Air Force Reserves, Navy, Navy Reserves, Marines, Marine Reserves, National Guard (Air or Army), Civilian Expeditionary, Coast Guard, Coast Guard Activated with Navy);
- Status of Military Member (Active, Reservist, Activated Reservist, Activated Guard, Activated Civilian Expeditionary Inactive Reservist, Inactive Guard, Unknown by Family Member);
- Demographics Rank, Gender, Age, Affiliation (Service Member, Family Member

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Spouse, Family Member Dependent Child, Family Member Dependent Parent, Retiree/Veteran, Non-Dependent Parent, Guardian, DoD Service Provider, or other) and Marital Status (Single, Married, Divorced, Separated, Widow, Widower, Dual Military Career, Single Parent with Custody);
-Participant Location by Closest Installation and City and State.

1.1.17 SERVICE REPORTS

1.1.17.1 Service Component Participant Utilization Reports for (Army, Army Reserves, Air Force, Air Force Reserves, Navy, Navy Reserves, Marines, Marine Reserves, National Guard (Air and Army), Civilian Expeditionary, Coast Guard Activated with Navy) to include:

- Type of service (Non-Medical Counseling (face to face, telephonic, online, or video), Health and Wellness Coaching (Telephonic or Online), Financial Counseling (face to face or telephonic), Tax Services, Document Translation Services, and Specialty Consultations to include: (Special Needs Consultation, Wounded Warrior, Elder Care, Education, Adult Disability, Adoption, and Work Life.) Information and Referral, Spouse Education and Career Opportunities (SECO); and all Quick Calls;
- Crisis, Duty to Warn, Mandated Report Summaries, by Service and Installation;
- Number of open, in progress, closed and unused referrals (i.e. no shows);
- Location (City, State, Country and Closest Installation);
- Status of Military Member (Active, Reservist, Activated Reservist, Activated Guard, Activated Civilian Expeditionary Inactive Reservist, Inactive Guard, Unknown by Family Member);
- Demographics to include: Rank, Gender, Age, Affiliation (Service Member, Family Member Spouse, Family Member Dependent Child, Family Member Dependent Parent, Retiree/Veteran, Non-Dependent Parent, Guardian, DoD Service Provider, or other) and Marital Status (Single, Married, Divorced, Separated, Widow, Widower, Dual Military Career, Single Parent with Custody).

1.1.18 QASP/QCP REPORT SHOULD INCLUDE BUT NOT BE LIMITED TO:

- 1.1.18.1 Customer recovery.
- 1.1.18.2 Number of Complaints escalated and resolved.
- 1.1.18.3 Report of QASP measures and metrics provided by contractor on contractor quality and performance improvement measures.
- 1.1.18.4 Personnel and Training
- 1.1.18.5 Position Management Report
- 1.1.18.6 Network Status Report
- 1.1.18.7 Reference QASP

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1.1.19 MILITARY ONESOURCE NETWORK OF NON-MEDICAL COUNSELORS

- Number of verified licensed and credentialed non-medical counselors and in MOS network.
- Number of MOS trained non-medical counselors in the MOS network.
- Number of signed and contracted non-medical counselors accepted to MOS network.
- Number of Criminal History Background Checks and Fingerprint Checks initiated/verified.
- Number of Criminal History Background Checks and Fingerprint Checks completed within 60 days of initiation.

1.1.20 EAP WEB PRESENCE AND COMMUNICATIONS

- Webinars conducted, topics, and # of attendees;
- Moderated chats conducted, topics, and # of attendees;
- Materials released;
- Military Service (Army, Army Reserves, Air Force, Air Force Reserves, Navy, Navy Reserves, Marines, Marine Reserves, National Guard (Air or Army), Civilian Expeditionary, Coast Guard, Coast Guard Activated with Navy);
- Status of Military Member (Active, Reservist, Activated Reservist, Inactive);
- Demographics Rank, Gender, Age, Affiliation (Service Member, Family Member Spouse, Family Member Dependent Child, Family Member Dependent Parent, Retiree/Veteran, Non-Dependent Parent, Guardian, DoD Service Provider, or other) and Marital Status (Single, Married, Divorced, Separated, Widow, Widower, Dual Military Career, Single Parent with Custody);
- Participant Location by Closest Installation and City and State;
- EAP content that has been viewed by participants/users;
- Count of which content is viewed, listed by content title;
- Top 10 query strings searched for on the EAP website;
- The number of times each EAP online service is accessed.

1.1.21 FINANCIAL DISBURSEMENT REPORT

- 1.1.21.1 The Contract Fund Status Report will include the amount invoiced to date, the amount received in payments to date, the amount that has been invoiced but not paid, the funds remaining not invoiced, and month when 80% of funding is anticipated to be spent. All information will be reported by CLIN/Sub-CLIN;
- 1.1.21.2 Cumulative hours expended throughout the reporting period by labor category.